

## MEETING PLANNER'S CHECKLIST

- \_\_\_ 1. Define the general purpose of the meeting. Determine the specific objectives for the meeting.
- \_\_\_ 2. Determine who should attend the meeting. Take care to determine whose presence at the meeting is essential.
- \_\_\_ 3. Determine roles — who will serve as chairperson, facilitator, recorder.
- \_\_\_ 4. Schedule time, place, and duration of the meeting. Secure room or location for the meeting. To ensure that all essential participants are available to attend, coordinate scheduling or delegate responsibility to an assistant.
- \_\_\_ 5. Draft the tentative agenda. Determine what format and techniques for discussion and problem solving will be incorporated.
- \_\_\_ 6. Determine necessary materials, equipment, possible refreshments, and other physical details of the meeting. Place necessary orders or delegate responsibility to an assistant.
- \_\_\_ 7. Determine how participants will be notified about the meeting — by telephone, e-mail, or other method of meeting notice.
- \_\_\_ 8. Notify participants with adequate lead time. Include tentative agenda, if possible. At the very least, the meeting notification should include information about the meeting's purpose, objectives, and any premeeting preparation or materials that may be needed from individuals. Finally, include information about the meeting's time, duration, location, and participants.